

January 2004

RE: EDExpress for Windows 2004-2005, Release 1.0

Dear EDExpress Users:

We are pleased to announce the availability of EDExpress for Windows 2004-2005, Release 1.0. This is the initial software release for the 2004-2005 award cycle. This letter describes general changes to EDExpress, as well as enhancements to the following components in this release of the software:

- Application Processing
- Packaging
- Global functionality (such as Security setup, Document Tracking and User Database)

We are including the following information in this letter:

- A list of product enhancements
- Results gathered from EDExpress benchmark testing
- Reminders on backing up and optimizing your EDExpress database

Note: At this time, the Department's Fiscal Year 2004 Appropriation has not been approved. Therefore, the 2004-2005 Pell Payment Schedule included in Release 1.0 is based upon the current \$4050 maximum Pell Grant. After the Department's Fiscal Year 2004 Appropriation is finalized, we will update, if necessary, the Pell Grant Payment Schedule through a future release of EDExpress. If you use the EDExpress Packaging Module to award Pell Grants, you may want to wait until it is known whether the Pell Payment Schedule will change.

How to Get the Software and Documentation

You can download Release 1.0 and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at FSAdownload.ed.gov.

Instructions for downloading EDExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *2004-2005 Installation Guide for EDExpress for Windows*.

If you have trouble opening the FSAdownload Web site contact CPS/WAN Technical Support at **800/330-5947; TDD/TTY 800/511-5806** or through e-mail at cpswan@ncs.com.

Note: Some organizations restrict their users from downloading from File Transfer Protocol (FTP) sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure that you have full FTP download rights.

Important Installation Alert

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Please consult with your school's technical department if you receive a warning that an Administrator must install the EDEExpress software.

If You Have Technical Support Questions

If you have questions regarding EDEExpress, such as installation issues, software problem resolution, software functionality, and technical assistance, contact CPS/WAN Technical Support.

You can reach CPS/WAN Technical Support from Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947; TDD/TTY 800/511-5806**. You can also send e-mail inquiries, comments, or suggestions to cpswan@ncs.com. A representative will respond within 24 business hours.

You can also post questions regarding EDEExpress on our e-mail listserv, FSATECH. FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's Federal Student Aid (FSA) systems, software, and mainframe products.

For more information about FSATECH, including how to subscribe, visit the FSA Schools Portal: Listservs & Mailing Lists: FSATECH Web site at:

ed.gov/offices/FSA/services/fsatechsubscribe.html

Note: Make sure you include your telephone number in your message. We will research your question and post our response to the listserv so that everyone can benefit from the information.

CPS/WAN Technical Support

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EDExpress for Windows 2004-2005, Release 1.0

EDExpress for Windows 2004-2005 consists of four software modules:

- Application Processing
- Packaging
- Direct Loan
- Pell

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking, and User Database setup and entry, is added during any Full installation of EDExpress.

The EDExpress for Windows 2004-2005 software and other PC products are now referred to as “releases” rather than “versions.” For 2004-2005, EDExpress for Windows, Release 1.0 contains Application Processing, Packaging, and Global functionality. Release 2.0 (due for release in March 2004) will add Pell and Direct Loan functionality.

Release 1.0 does not overwrite your EDExpress for Windows 2003-2004 database; instead, it creates an entirely new and separate database.

Product Enhancements

The following product enhancements have been incorporated into EDExpress for Windows 2004-2005, Release 1.0.

General Changes

- Year indicators and date ranges have been updated for the 2004-2005 award year.
- Data fields have been modified to reflect the changes in the new 2004-2005 FAFSA.
- The EDExpress for Windows 2004-2005 database has been updated from the Microsoft Access 97 database platform to Microsoft Access 2002.
- The EDExpress software’s Windows icon and splash-screen have been color-coded pink to match the 2004-2005 FAFSA form.

Global

- On the 2004-2005 FAFSA, the applicant is asked one Enrollment Status question, instead of the five separate Enrollment Status questions asked in previous cycles. EDExpress matches the new field and utilizes the same valid values as the 2004-2005 FAFSA. These valid values are:

1 = Full time

2 = 3/4 time

3 = 1/2 time

4 = Less than 1/2 time

5 = Not sure

- A new field labeled Country Code is now available in the Permanent Address section of the Demo tab. If you provide an “FC” (Foreign Code) value for Permanent State on the Demo tab, the Country Code field is activated and can be populated.

Note: Data entered in the Country Code field is submitted to the Common Origination and Disbursement (COD) system but not to the Central Processing System (CPS).

- Some schools are prohibited from sending student correspondence displaying the student’s Social Security Number (SSN) by mail. To provide these schools with greater flexibility, a checkbox is now available on the Print dialog for all EDExpress letters (Award Letters, Document Tracking Letters, and User-Defined Letters) that excludes the SSN during paper printing of letters. EDExpress continues to remove the student’s SSN in all cases when printing letters to e-mail.
- File Format codes for External Export are now included in Prior Year Import functionality. If your File Format codes remain the same from the prior year, importing these codes from your EDExpress for Windows 2003-2004 database will save you time by eliminating the need to recreate them in EDExpress for Windows 2004-2005 setup.
- For more effective communication with students, the Document Tracking letter has been enhanced to display an “M” (Missing) or an “I” (Incomplete) next to the document description and use “Missing and/or Incomplete” in the body text of the letter as appropriate.
- The Add Date, Add ID, Add Time, Update Date, Update ID, and Update Time fields are removed from the User Data Report, as these fields are not truly User Defined Fields. All User Defined Fields continue to print on the User Data report.
- The Browse Only option definable at the Security Group level in setup is enhanced to enable access to any new buttons and dialogs within each tab. This enhancement enables Browse-Only users to “drill down” and view detailed information on

EDEExpress records. For example, on the Awards Tab, a Browse Only user now has read-only access to data on any of the four dialogs attached to the tab, including the Awarded Funds grid.

- A new Global report called List – SSN Difference displays the discrepancies between original and current student identifiers. This report assists you with identifying all records for a student when multiple identifiers have been used for the student in a given award year.
- A new EDEExpress setup feature allows you to define and save certain “stable” user data at the User ID level to more quickly authenticate your identity when accessing the FAA Access to CPS Online Web site from within EDEExpress (see Application Processing section in this letter for more detail). While you will always be required to provide a PIN when accessing either the FAFSA or Student Inquiry tabs, the other user data required — such as SSN and Date of Birth (DOB) — is stored securely in the EDEExpress database and will be populated automatically on the login screen for FAA Access to CPS Online authentication. Personal data supplied in setup at the User ID level is viewable only by the individual who entered and saved the data. After the personal data is saved, it will display as a series of asterisks.

Note: This functionality is not available for the SYSADMIN user ID. It can only be used on unique, non-SYSADMIN User IDs.

- The Repair Database and Compact Database utilities have been combined into one process through the Tools, Utilities menu.

Application Processing

In past versions of EDEExpress, users sent initial FAFSA and Institutional Student Information Record (ISIR) correction data to the CPS by entering data in EDEExpress and creating export files for transmission through the Student Aid Internet Gateway (SAIG).

In EDEExpress for Windows 2004-2005, this process is redesigned so that you can take advantage of initial FAFSA entry and real-time CPS correction processing through the Web.

EDEExpress users no longer need to export or transmit initial FAFSA or ISIR correction data to the CPS; the data is submitted through Web Services technology, and processed results are returned to your SAIG mailbox.

When you access the FAFSA tab or the Student Inquiry tab (formerly the SAR/ISIR tab) of a student record in EDEExpress, the software’s embedded browser technology will activate and display the authentication site for the FAA Access to CPS Online Web site. Once your authentication data has been accepted, you can elect to perform Application or Correction Entry, or view student ISIR transactions.

Each time you leave a tab in EDEExpress with a live connection to the FAA Access to CPS Online Web site, EDEExpress ends your Web session. This prevents other users from performing activities on the Web site under your User ID.

You can continue to import ISIR data, print ISIRs, and print reports on imported ISIR data in the EDEExpress Application Processing module, as well as export ISIR data to an external file. You can also continue to import ISIR data into the Packaging, Pell, and Direct Loan modules.

Other Application Processing functionality that previously existed in EDEExpress for Windows has been moved to the FAA Access to CPS Online Web site, such as:

- Estimated Taxes Paid Calculation
- ISIR Requests
- Verification Worksheet

For more information on 2004-2005 changes to the FAA Access to CPS Online Web site, please review the 2004-2005 School Electronic Process Guide, available in the Technical References and Guides section of the Department's FSAdownload Web site, located at FSAdownload.ed.gov.

The following additional changes have been made to the Application Processing module for 2004-2005:

- Since FAFSA data in EDEExpress is now submitted through the FAA Access to CPS Online Web interface, you no longer provide the following data elements in Application Processing System setup:
 - Default Housing Plans
 - Default Cost of Attendance
 - Assumed School
 - Default Transaction Displayed
- **Note:** Your Federal School Code still needs to be established as the “assumed school” in Global School Setup.
- Import functionality in EDEExpress has been updated to accept all 2004-2005 ISIR Datamart and CPS message classes. For further information, please review Section 1 (Overview) and Section 2 (EDE Processing) of the 2004-2005 EDE Technical Reference, available in the Technical References and Guides section of the Department's FSAdownload Web site, located at FSAdownload.ed.gov.
- With the new interface between EDEExpress and the FAA Access to CPS Online Web site, export functionality from EDEExpress to the CPS is no longer necessary. ISIR files you receive no longer contain CPS Header and Trailer records with batch

identifiers. Therefore, we have removed all Batch Activity functionality from the Application Processing module.

- FAA Information and List Changes information for each ISIR transaction you receive is now accessible through the View menu on the ISIR Review tab.
- When an assumption has been made on an ISIR, a notation is displayed on the ISIR Review tab. This notation alerts you to go to the Process List Changes dialog box in order to see the assumed values for the record.
- Enhancements have been made to the List Changes dialog box. The student's name and trankey (SSN, Name ID, and transaction number) now display on the title bar for quick reference. In addition, the Entered Value column is completely removed from this dialog box, as we no longer store entered FAFSA values in the EDEExpress database.
- We have added a pre-defined Application Processing query called "Processed Record Type" that allows you to filter the output on ISIR data lists based on Record Type and Transaction Processed Date. This query helps you to identify and differentiate ISIR transactions based on the source; for example, FAFSAs, or ISIR corrections.

Packaging

- For quick reference, the Status Information box on the Awards Tab now displays the SAR C Flag if it is present on an ISIR transaction you import into Packaging.
- The Packaging Browse grid under the Tools menu now lists the text descriptions for the terms you define for your Academic Year Profile codes. In prior EDEExpress versions, only the codes were listed. This enhancement allows you to view and export the total amount awarded for each type of fund by term description.
- To improve Financial Aid Administrator (FAA) identification and student recognition of Award Letters printed and sent through e-mail, a year indicator now automatically displays in the Award Letter e-mail subject line and in the attachment title.
- The student e-mail address field has been added to the Packaging External Import Add and External Import Change record layouts.
- External Import Change record layouts only allow fields with a maximum of 35 bytes. Since the student e-mail address field is 50 bytes, this data element is a "designated" field on each External Import Change record. This means if you want to add or update the student e-mail address field, you do not need to include the corresponding change field number followed by the modified value. The e-mail address field is now a constant field occupying its own position in the Packaging External Import Change record layout.

Enrollment for FAA Access to CPS Online

Prior to using the EDEExpress for Windows 2004-2005, Release 1.0 to process Application Processing data, the Destination Point Administrator (DPA) of the TG number you use to send and receive FAFSA and ISIR correction data should verify enrollment for FAA Access to CPS Online Web site services is completed. The DPA should ensure during this process that individual users at your school performing FAFSA or ISIR correction data entry tasks are enrolled for these services.

Enrollment for the FAA Access to CPS Online is accomplished through the SAIG Enrollment Web site, located at FSAWebenroll.ed.gov

EDE and Packaging Technical References

The *EDE Technical Reference* and the *Packaging Technical Reference* contain technical details such as record layouts and valid field contents. The *Packaging Technical Reference* also contains worksheets and import and export information for interfacing EDEExpress Packaging with an external mainframe system.

Both technical references can be downloaded from the FSAdownload Web site located at FSAdownload.ed.gov.

EDExpress Supports These Printers

We tested the following printers that are Windows NT 4.0, Windows 98, Windows Me, Windows 2000, and Windows XP compatible:

- HP8150
- HP4000N
- HP8000N
- HP4
- HP4M
- HP4MPlus
- HP11Si
- HP4Si
- HP5Si
- HP5SiMX

EDExpress Benchmarking

We performed benchmarking tests on the EDExpress for Windows 2004-2005, Release 1.0 software to determine how it operates in certain operating environments.

Imports

The benchmarking results for EDExpress import files are as follows.

- These tests were all completed on a Pentium 800 with 128 MB RAM.
- Records were imported into an empty database.
- The Time Elapsed column indicates the measurement of time starting when the user clicks OK in the Import dialog box to begin the import process until the import statistics are displayed.

Imports Benchmarking Volume

Report	Operating System	Benchmarking Volume	Average Time Elapsed
ISIR Data	NT 4.0	1000	35 seconds
ISIR Data	Windows 98	1000	42 seconds
ISIR Data	Windows Me	1000	42 seconds
ISIR Data	Windows 2000	1000	34 seconds
ISIR Data	Windows XP	1000	36 seconds

Reports

The benchmarking results for EDExpress reports and lists are as follows:

- These reports were tested in Windows NT, Windows 98, Windows Me, Windows 2000, and Windows XP on HP LaserJet 3 si, 4, 4 si, and 8150DN printers.
- These tests were all completed on a Pentium 800 with 128 MB RAM.
- The Average Time Elapsed column indicates the measurement of time starting when the user clicks OK in the EDExpress Print dialog box and ending when the operating system (Windows NT/98/Me/2000/XP) print dialog appears.
- The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

Reports Benchmarking Volume

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Document Tracking Letter	NT 4.0	5 records	1 second
Document Tracking Letter	Windows 98	5 records	1 second
Document Tracking Letter	Windows Me	5 records	1 second
Document Tracking Letter	Windows 2000	5 records	1 second
Document Tracking Letter	Windows XP	5 records	1 second
Mailing Labels	NT 4.0	25 records	1 second
Mailing Labels	Windows 98	25 records	1 second
Mailing Labels	Windows Me	25 records	1 second
Mailing Labels	Windows 2000	25 records	1 second
Mailing Labels	Windows XP	25 records	1 second
ISIR	NT 4.0	2 records	1 second
ISIR	Windows 98	2 records	1 second
ISIR	Windows Me	2 records	1 second
ISIR	Windows 2000	2 records	1 second
ISIR	Windows XP	2 records	1 second

Reports Benchmarking Volume (Continued)

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Processed ISIRs	NT 4.0	25 records	1 second
Processed ISIRs	Windows 98	25 records	1 second
Processed ISIRs	Windows Me	25 records	1 second
Processed ISIRs	Windows 2000	25 records	1 second
Processed ISIRs	Windows XP	25 records	1 second
Award Letters	NT 4.0	2 records	1 second
Award Letters	Windows 98	2 records	1 second
Award Letters	Windows Me	2 records	1 second
Award Letters	Windows 2000	2 records	1 second
Award Letters	Windows XP	2 records	1 second
Packaging Setup	NT 4.0	26 pages	1 second
Packaging Setup	Windows 98	26 pages	1 second
Packaging Setup	Windows Me	26 pages	1 second
Packaging Setup	Windows 2000	26 pages	1 second
Packaging Setup	Windows XP	26 pages	1 second

Reminders

Back Up Your Database Weekly

You should back up your EDEExpress database file (expres45.mdb) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, packaging a large group of student records), or at least once a week. You should also back up your data before and after you run utilities as a precautionary measure.

EDEExpress does not include a backup utility. You must use your own backup software. Be sure to test your backup software regularly to verify that it can reliably restore your backups.

Optimize Your Database with Software Utilities

EDEExpress contains utilities that allow you to optimize your database to prevent problems. We recommend that you run the Compact and Repair and Verify Database utilities on your database at least once a week. Be sure to create a back up of your database before and after running these utilities.

Run the database utilities in the following order:

- Compact and Repair Database
- Verify Database
- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of EDEExpress by optimizing the database (expres45.mdb) file and reclaiming space on your computer's hard drive. Running this utility at least once per week helps to prevent database problems.

Events such as a power outage or a Local Area Network (LAN) failure can corrupt your database if it occurs while EDEExpress is updating student records. EDEExpress may not detect database corruption, so if your system functions unpredictably (for example, you start getting database error messages, even for something as simple as a missing flag on a record), run the Compact and Repair Database utility.

Running the Compact and Repair Database function on a regular basis can make your database significantly smaller and improve EDEExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and by removing any records that have been flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive that is at least equal to three times the current size of the database.

Prevent Problems with the Verify Database Utility

Each student record in EDEExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDEExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record may become damaged. Verify Database repairs these damaged links within the database.

You should always run the Repair and Compact Database utility before and after running the Verify Database utility. Running this utility at least once per week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, be sure you have hard drive space available that is at least equal to three times the current size of the database.